



## About Adobe PDF forms

An Adobe PDF form is an electronic-based document that can collect data from a user and then send that data via email or the web. A PDF form can contain static or interactive form fields. For the purposes of this training, I will be discussing interactive form fields only. Interactive forms let the user fill in the form using his or her computer. Users who fill in a PDF form that contains interactive form fields using Adobe Acrobat Professional or Adobe Acrobat Standard can save their form data along with the PDF form.

It's easy to create electronic PDF forms using Adobe Designer or Adobe Acrobat Professional. You can design and create an entirely new form, or you can quickly convert your existing paper and electronic forms to PDF and then add PDF form fields.

## Elements of an Adobe Acrobat PDF form

A PDF form created by Acrobat Professional can contain the following form elements:

### **Button**

Can specify an action, such as opening a file, playing a sound, or submitting data to a web server.

### **Check boxes**

Present a group of choices from which you can typically select one or more items.

### **Combo box**

Presents a list of items in a pop-up menu for you to choose from or lets you enter your own values.

### **Digital signature field**

Lets you electronically sign a PDF document with a digital signature.

### **Document Message Bar**

Displays information about the PDF form and can display tools and options.

### **List box**

Displays an entire list of options that you can scroll through and from which you may be able to select more than one item.

### **Radio buttons**

Presents a group of choices from which you can typically select only one item.

### **Text field**

Lets you fill in text such as name, address, and phone number.

## Guidelines for creating a new form in Adobe Acrobat Professional

To design a form from scratch, follow these general steps:

Define the form data you need to collect. Your data requirements determine the types of form fields to add to the form.

The form should be designed by OPI Publishing based on usability and visual appeal.

Once the form is designed, it will be returned to you to add the form fields.

You will then send the completed form to the Internet Services Bureau to be conditioned and placed on the web server.

## To create a form field in Acrobat:

- 1 Choose Tools > Advanced Editing > Show Forms Toolbar.
- 2 On the Forms toolbar, select a forms tool.
- 3 Do one of the following:
  - Drag the cross-hair pointer to create a form field of the required size.
  - Double-click the page to create a form field using the default size.

**Note:** You cannot create a form field on top of a comment. In the [form field name] properties dialog box, set the form field's property options, and then click Close. (For more information on setting the form field properties, see [Setting Acrobat form field properties in Adobe Acrobat Help](#).)

## Setting Acrobat form field properties

You can set a variety of properties for an Acrobat form field, depending on the form field type. For example, the combo box and text form fields include format, validation, and calculation properties; however, these settings are not available for a check box form field.

To save time when creating form fields, you can define default properties for a specific form field type, which you can then use as a template when you add another form field of the same type. For example, you can create a check box, specify all the properties, and save the properties as the default values for all check boxes. The next check box you add to the form will have the same property values.

To make a form field display helpful text, such as instructions or the form field's text label, when the user places the pointer over the form field, just type the text in the Tooltip box in the Text Field Properties window. The Tooltip text is also read by screen readers. (See [Making Adobe PDF forms accessible](#).)

## To set default properties for a form field type:

- 1 To select the form field, do one of the following:
  - Select the forms tool you used to create the form field that you want to change.
  - Choose Tools > Advanced Editing > Select Object tool.
- 2 Open the form field properties dialog box, and specify the settings.
- 3 Right-click (Windows) or Control-click (Mac OS) the form field, and then select Use Current Properties As New Defaults. (Double-click on the page to create a form field using the default properties settings for that form field type.)

## Aligning, centering, and distributing form fields

You can quickly position form fields by aligning them relative to one another, centering them relative to the page, or distributing them relative to one another.

### To align form fields:

- 1 On the Forms toolbar, select the tool used to create the form field.
- 2 Press Shift and select the form fields that you want to align. You must select a minimum of two form fields.
- 3 Right-click (Windows) or Control-click (Mac OS) the field that is to remain stationary, and then choose a command from the Align menu:
  - Left, Right, Top, or Bottom aligns all form fields with the respective border of the anchor form field.
  - Vertically aligns all form fields along the vertical axis of the anchor form field.
  - Horizontally aligns all form fields along the horizontal axis of the anchor form field.

### **To center form fields:**

- 1 In the Forms toolbar, select the tool used to create the form field.
- 2 Press Shift and select the form fields that you want to center.
- 3 Right-click (Windows) or Control-click (Mac OS), and choose a command from the Center menu:
  - Vertically centers the form fields with respect to the page's vertical dimension.
  - Horizontally centers the form fields with respect to the page's horizontal dimension.
  - Both centers the form fields on the page.

### **To distribute form fields:**

- 1 On the Forms toolbar, select the tool used to create the form field.
- 2 Press Shift and select the form fields that you want to distribute. You must select a minimum of three form fields.
- 3 Right-click (Windows) or Control-click (Mac OS) and choose one of the following commands from the Distribute menu:
  - Vertically distributes the intermediate form fields evenly between the topmost and bottommost form fields in the selection. This action disregards Snap To Grid.
  - Horizontally distributes the intermediate form fields evenly between the leftmost and rightmost form fields in the selection. This action disregards Snap To Grid.

## **Defining the tabbing order of form fields**

If a PDF document isn't tagged and doesn't have a specified tab order, the order in which the form fields were created determines their tabbing order. If a PDF document is tagged, the document structure determines the form fields' tabbing order unless the user has deselected the Tab Order option in the Accessibility preferences. (See [Setting accessibility preferences](#).)

You can use the Tab Order options in the Page Properties to set the tab of form fields by the row order, column order, or document structure. (See [Defining the tabbing order](#).) This method is useful only if the form fields are organized in rows or columns, or if the form fields are tagged. If you want to manually customize the tab order with Acrobat, you can use the Set Tab Order command.

### **To set the tabbing order of form fields:**

1 Choose Advanced > Forms > Fields > Set Tab Order. Each form field displays a unique number that represents its tabbing order.

**Note:** You can choose this command only if the tab order property in the Page Properties is set to Unspecified. To change a form field's tab number, click the field.

## Reoccurring form fields

Some forms may have reoccurring form fields, such as a name and date at the top of each page. You can copy and paste the form fields from their first occurrence to each additional occurrence. Since the fields will have the same name, the user will only have to fill them out once.